

AI Insight Quick Reference Guide

Manage Broker Dealer Events



Alternative Investment Insight through Research, Training and Increased Efficiency

Use AI Insight's *Manage Broker Dealer Events* feature to find out about webinars or other events happening within the industry.

View Upcoming Events

You can view events in two ways:

- 1) Click the “**Updates and Events**” button in the top navigation menu.
- 2) Click “**Manage Broker Dealer Events**” under “**Action Items**” on the Dashboard.
- 3) Navigate through each of the three tabs to view available events:



Approve Sponsor Events for Advisors

To approve sponsor events for your advisors, click the “**Manage Sponsor Events**” tab. Then, click “**Approve**” for the corresponding event.

Manage Sponsor Events Video Tutorial Help

Manage Firm Events **Manage Sponsor Events** AI Insight Events

[Click here](#) if you would like to send members of your current selling group (who are AI Insight subscribers) a reminder that the posting of their events will help keep you better informed on their investment sector and products.

Sponsors: Approved Status: Event Date: From To Keyword:

Click On Column Names to Sort (Note: Description, Date Indication of Interest Sent are not sortable).

EVENT	LOCATION	START	END	DESCRIPTION	HOSTED BY	DATE INDICATION OF INTEREST SENT	APPROVE
> A discussion with Mike Phillips - Risks & Opportunities in Commercial Real Estate	http://dpre.gister....	3/26/2020 11:00 AM EST	3/26/2020 11:45 AM EST	Based on the overwhelming dema	PREP Property Group LLC	Not Applicable	Approve
> You're Invited! TI+: Income and YTD Positive Returns through COVID-19 Pandemic	http://dpre.gister. linkSecurityString	3/25/2020 1:00 PM EST	3/25/2020 2:00 PM EST	TI+ Fund's Executive a	Bluerock Real Estate, LLC	--	Approve

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Questions? Contact AI Insight Customer Care Monday-Friday from 8:00 a.m.-6:00 p.m. ET at 877.794.9448 ext. 710 or send an email to customer care@aiinsight.com.

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